



**A BEQUEST TO THE
ORDER OF MALTA
IS TO GIVE HOPE
FOR THE FUTURE**



**ORDER OF MALTA
AUSTRALIA**



A MESSAGE FROM OUR HOSPITALLER

Most of you reading this are aware of the Order of Malta and its commitment to assist the poor, needy and the sick. The Order has been doing this for almost 1,000 years.

Since the Australian Association of the Order of Malta was established in 1973, we have undertaken projects across all regions of Australia and the Asia-Pacific region. We have also assisted financially with the work of the Order internationally.

The work we do relies entirely on the generosity of members and friends. The Association here in Australia has grown from proud traditions and now enters an exciting new period of growth and increased works both regionally and nationally.

Created from extensive national consultation of membership over a two year period, a new strategy has been launched that will see a renewed commitment to delivering unique 'hands on' programs across Australia and abroad to those in need.

This is an exciting new stage of development for our association but also will bring with it an ongoing challenge. How do we continue to create and sustain these new programs? How do we ensure we have the resources to serve?

Our members and benefactors have shown great generosity when we are able to deliver our works to the community and ensure visibility and transparency in the use of these funds.

Bequests will increasingly play an important role in our fundraising efforts as our association now continues to grow and develop. I respectfully ask you to consider including the Australian Order in your estate planning as it will help the Order continue its life changing work for 'Our lords the sick and the poor' for the immediate future and for generations to come.



John Murphy KMG - National Hospitaller

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THE IMPORTANCE OF MAKING A WILL

If you die without a Will, your Estate will be divided according to law. By making a Will you have a say in how your assets will be distributed and you can protect those close to you from additional worry, expense and unnecessary legal disputes.

THINGS YOU WILL NEED TO CONSIDER WHEN MAKING YOUR WILL

- * **Make the intention clear** - In order to adhere to your wishes and avoid any unwanted disputes over your will, your intention to leave a bequest, and the gifts, should be clearly worded and identified.
- * **Choosing Executors** – These people will be responsible for carrying out your wishes and it is recommended that you ask them if they are willing to accept the responsibility.
- * **Keeping your Will up to date** – It is important to review your Will every few years to ensure that the content is still valid. A Will that does not reflect current family status, such as marriage, birth of a child, death of a loved one or divorce can be invalid.
- * **Witnesses** – Your Will requires the signature of two people over 18 who are not beneficiaries or the immediate family of a beneficiary. This is in case your Will should be contested.
- * **Seeking professional help** – We suggest that you consult an expert and obtain independent professional advice from a solicitor to make or adjust your Will. They will be able to guide you through the process, advise you on the legal implications of any decisions you make and help you avoid errors that would render the Will invalid.
 - Discuss openly with family and dependents any intention of leaving a legacy to the Australian Order of Malta.
 - Please advise us of your intention to make a gift in your will so that we can acknowledge and thank you in your lifetime. However, we appreciate that some benefactors prefer to remain anonymous and the Australian Order of Malta respects this wish.

\$5,000 will fund a child in our Creating Leaders program in Timor-Leste for the entirety of their secondary education. This would include the costs of their uniforms, books and transport to and from school each day.



\$50,000 could purchase a Community Care van for our volunteers who assist the homeless



REMEMBERING THE ORDER OF MALTA IN YOUR WILL

There are a number of ways that you can remember the Order of Malta in your Will:

- * Fixed amount bequest – where you designate a specific sum of money to be given to the Australian Order of Malta
- * Percentage bequest – where you leave a specified percentage of the residue of your Estate
- * Residual bequest – the remainder of your estate once all debts, charges and other bequests have been made
- * Contingent bequest – is conditional on a certain event occurring before distribution to the beneficiary. The most common example of this is if your spouse passes away before you
- * Life Insurance or Superannuation Policies– subject to the terms of the policies, you can make the Australian Order of Malta the beneficiary of an insurance or superannuation policy

INCLUDING THE ORDER IN YOUR EXISTING WILL

If you have an existing Will and would like to include a bequest to the Australian Association of the Order of Malta, you can do so by the addition of a codicil. Just like a Will, it is a legal document and must be signed and witnessed.

\$2,000 could buy 60 specially designed coats for homeless for Australians who are unable to find shelter in emergency accommodation.



\$50,000 could fund a Camp for Disabled Youth for 150 participants



SUGGESTED WORDING TO MAKE A BEQUEST TO THE AUSTRALIAN ASSOCIATION OF THE ORDER OF MALTA

Your solicitor may find the following helpful in preparing your Will or codicil.

A bequest makes an especially valuable contribution to the long-term planning of the Australian Association of the Order of Malta. Bequests are usually directed to the Australian Order of Malta for use at its discretion in accordance with its charitable purposes. Such unencumbered gifts allow the Australian Order of Malta the flexibility to use donations in areas of particular need.

- A.** I GIVE to the Australian Association of the Order of Malta Limited (ABN 37 142 209 121) free from all duties and charges:
Gift
(a) \$..... (a specific sum of money) and (specific assets); or
(b) \$..... percentage (%) of the residue of my estate; or
(c) the residue of my estate and I acknowledge that the residue of my estate means the assets remaining after any gifts provided to my loved ones and dependents and; and
- B.** If the gift in (A) cannot take effect completely or at all, to the extent that it cannot take effect: to the charitable organization or organization in Australia that my executors in their discretion consider most nearly fulfils the objects I intend to benefit in the share or shares my executors think fit.

Declaration

I declare that the receipt of the Treasurer or other proper officer of the Australian Association of the Order of Malta Limited shall be a complete discharge of my bequest.

This information is provided as general assistance only and is not legal advice. Drafting of wills without expertise can result in uncertainty which might have to be resolved by a court. You are strongly advised to instruct a lawyer, who has Wills/Estate law expertise, to assist you to draft your will.

IN MEMORIAM TRIBUTES

When a loved one passes away, an In Memoriam donation is a beautiful way to acknowledge their passing and such a lasting tribute can help to bring consolation at a time of grief to surviving friends and relatives.

Many people, for example, arrange an In Memoriam donation in lieu of giving flowers. If you would like donations to be made in your memory, please let those close to you know.

For more information on 'In Memoriam' donations, please contact;

Email: info@orderofmalta.org.au
Telephone: 02 9331 8477

Write to us at:

The President
Australian Association of Order of Malta
P.O. Box 79 Caringbah, NSW 1495, Australia

HELP US PLAN FOR THE FUTURE

By leaving us a legacy, no matter what size, you allow us to better plan for the future. With guaranteed funds in place, we can look to expand and develop our humanitarian activities with confidence.

If you intend to leave a legacy please take a few minutes to complete and return the Pledge Form opposite. Please be assured all pledges will remain confidential.

Thank you for your continued support of the Australian Association of the Order of Malta.

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PLEDGE FORM

Please take a few minutes to complete and return this form

Title: First name:

Last name:

Address:

State: Post code:

Telephone:

Today's date:

Please tick as appropriate:

- I have already included a gift to the Australian Association of Order of Malta in my Will
- I intend to include the Australian Association of the Order of Malta in my Will
- I would like to discuss making a bequest. Please phone me

The following information is optional but would be helpful to us in planning for the future. My gift will be:

- The residue of my estate
- % share of my estate
- The sum of \$
- An item, or items of value (please state)

Thank you for your support.

PLEASE RETURN TO:

The President
Australian Association of Order of Malta
P.O. Box 79 Caringbah, NSW 1495, Australia



Gifts to our emergency relief fund would allow us to respond quickly to emerging needs. Aid has previously been given to bushfire and flood victim support and assistance to Ukrainian refugees



**ORDER OF MALTA
AUSTRALIA**



ABOUT THE ORDER OF MALTA

The Order of Malta is a lay order of the Catholic Church and is active in 100 countries where its 47 National Associations initiate and sustain projects designed to deliver emergency aid, healthcare training and education for those in greatest need, remaining true to its 900-year old tradition of providing care with compassion.

To undertake our humanitarian activities we depend entirely on the generosity and kindness of individuals who make charitable donations. Please support us today.



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AUSTRALIA

The Australian Association of the Order of Malta

PO Box 79, Caringbah, NSW 1495

Phone: 02 9331 8477 | info@orderofmalta.org.au

ABN 37 142 209 121